Succession Planning
Frequently Asked Questions

About
Get your questions answered by reviewing the frequently asked questions below. Here you will find more detailed information on definitions, roles, limitations to Talent Connect, calibration, and nominating successors. If you have any additional questions or need assistance, please email odl@fairview.org.

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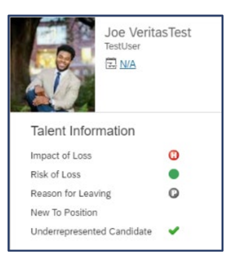
Roles and Responsibilities
What is the role of the team member?
- Each team member is encouraged to complete their talent profile in Talent Connect, including adding their photo to their profile. If a team member is identified as a potential successor they will meet with their leader to discuss opportunities for development.

What is the role of the leader?
- Leaders are responsible for going through the process of succession planning by evaluating their team members and making nominations to their position. They should also be collaborating with other leaders in discussing and nominating their talent.

What is the role of HR Strategy?
- HR Strategy's role it to partner and provide guidance to the leader as they walk through the succession planning process.

What is the role of OD&L?
- OD&L's role in succession planning is to provide training and resources to support the succession planning process. This includes keeping the user guide up to date and providing relevant development opportunities.

Talent Flags
What are talent flags?
- Talent Flags highlight meaningful information regarding a team member and are identified by their 1-up leader. Talent Flags are not visible to the team member.



What are the definitions for each flag?

- **Impact of Loss:** Impact to the Organization or Department if the team member leaves.
- **Risk of Loss:** Possibility that the team member would leave their current position or the Organization.
- **Reason for Leaving:** Potential reason for the team member to leave current position and/or the Organization.
- **New to Position:** Yes/No indicator if the team member has been in their position for less than a year (yes) or more than a year (no).
- **Underrepresented Candidate:** A team member identifying (in Lawson) as American Indian/Alaska Native, Asian, Black or African American, Hawaiian/Pacific Islander, Hispanic or Latino, or Two or More Races.
    - Leaders should refer to their My People Report in Lawson Manager Self-Service to gather information regarding the Underrepresented Candidate Talent Flag. If the report indicates “Yes” then they will click the Underrepresented Candidate box.
        - ⓘ This field/data should not be utilized for other purposes or reporting.

Performance Ratings

How are performance ratings determined?

- An individual’s performance rating for succession planning is automatically pulled from their most recent performance review. No action is required unless someone does not have a performance rating, or if you want to update their rating (which they can do so in a calibration session).

  ⓘ Changing a rating in succession does not alter their performance review rating.

How is Performance defined?

- An individual’s performance review rating is converted to a three-point scale for the purposes of succession.
    - **Unsatisfactory / Needs Improvement:** Does not achieve goals; consistently below expectations in goals and behaviors, or inconsistently meets expectations in goals and behaviors.
    - **Meets Expectations:** Achieves goals and demonstrates consistent behaviors.
    - **Exceeds Expectations / Exceptional:** Frequently exceeds expectations in goals and behaviors, or consistently surpasses expectations in goals and behaviors; role models & inspires others.

Can I change someone's performance rating?

- If you wish to change someone's performance rating (e.g., their performance has significantly changed since their last performance review), you can do so within your calibration session. See the Calibration section below for more information.

  ⓘ Changing an individual's performance review rating for the purposes of succession planning **will not** affect their performance review rating (it will not alter merit-based increases). If you choose to change a performance review rating for succession planning, they will receive a new performance rating that is only tied to succession, and thus not visible to the employee.

What if someone doesn't have a performance review rating?

- If someone does not have a performance review rating you can add a rating in your calibration session.

  ⓘ If you add a rating in a calibration session, this will not impact their performance review.

Potential Ratings

How are potential rating determined?

- Leaders are responsible for determining the potential rating for each of their direct reports. Potential can be rated right in a calibration session within the list view.

How is potential defined?

- An individual's potential should be thought of as the drive to pursue new opportunities and desire to take on more responsibility. Read through the following three rating descriptions for more detail:
    - **Low Potential:** Satisfied with what is needed in current position or is a master in their role; is not interested in taking on greater responsibilities for career progression.
    - **Medium Potential:** Motivated to succeed; accepts new challenges and responsibilities when assigned.
    - **High Potential:** Driven to succeed; actively pursues increased opportunities to influence decisions and drive change.

Dual Reports and Individuals Not in Talent Connect

What if I have dual reports?

- **If you have a dual report employee and you are their 1-up leader in Talent Connect:** As the 1-up leader, you have permissions to add talent flag and rate performance and potential for your dual report(s). However, to properly evaluate your dual report(s), reach out to their listed Matrix Manager and have a discussion or collaborative calibration session. When creating your team calibration session, you can add them as either a session facilitator or participant.
- **If you have a dual report employee and you are listed as their Matrix Manager in Talent Connect:** As the Matrix Manager you do not have permissions to add talent flags and rate performance and potential. Reach out to their 1-up leader, if they have not done so already, to have a conversation or hold a collaborative calibration session.
    - Even if someone does not fall within your scope in Talent Connect, you are still able to nominate them to your position.

What if I have direct reports who are not in Talent Connect?

- The information in Talent Connect comes directly from Fairview's Lawson system. At this time, succession planning is limited to team members who reside in Talent Connect.

Calibration

What is a calibration session?

- A calibration session is a tool that allows leaders to evaluate the performance and potential of their team all in one place. Leaders can also add talent flags right within the session.
- A calibration session can also be a collaborative tool to bring together multiple leaders to discuss, compare, and adjust performance and potential ratings across teams. See the Collaborative Calibration section below for more details on when you would want to hold this type of session.

What is the List View in the calibration session?

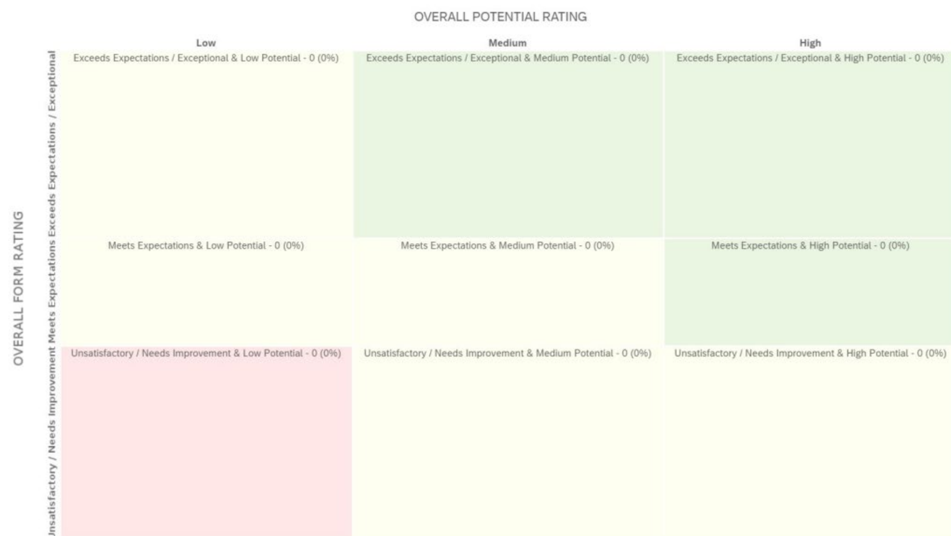
- The List view shows a tabular view of the subjects in the calibration session and their associated talent information (ratings and talent flags). Within list view, a leader can rate performance and potential.

What is the 9-Box in the calibration session?

- The 9 Box shows each of the subject's placement in a matrix, with performance on the y-axis and potential on the x-axis. Within the 9-Box view a leader can add talent flags, compare talent information, and move subject around.

What do the different boxes / colors represent on the 9-Box?

- **Green:** Green boxes or those in the upper-right portion of the matrix reflect individuals who are high performing and / or high potential talent. Individuals who fall in these boxes are those to consider as potential successors to either your position or other leadership roles.
- **Yellow:** Yellow boxes or those in the mid-range of the matrix represent talent that has moderate potential and or performance. Individuals who fall within these boxes may need more time and development before they are considered as future potential successors or may not wish to become a successor (e.g., they are satisfied in their current role).
- **Red:** The red box, located at the bottom left of the matrix represents any individuals whose performance is either Unsatisfactory or Needs Improvement and has a Low Potential rating.



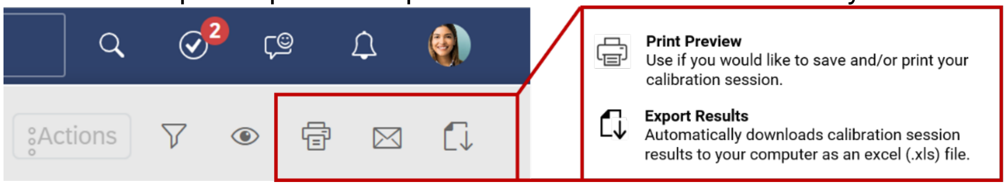
Example 9 Box Matrix in a calibration session. In calibration, Overall Form Rating on the y-axis refers to Performance.

How are the roles in a calibration session defined?

- **Session Owner:** Leader(s) who have direct reports being calibrated in the session. Owners have full editing privileges to a calibration session including the ability to edit and delete the calibration session, move subjects around the 9-Box, export results, and finalize a session.
- **Session Facilitators:** Users who you want to invite to the session. Facilitators do have editing capabilities. We highly suggest including your 1-up leader, any additional leaders you want to be part of the conversation, and your HR Strategist.
- **Session Participants:** Participants have visibility to the calibration session, but do not have editing privileges. This may be additional leaders that you want to include in your discussion and are okay with granting them visibility to your team.
- **Session Subjects:** Individuals who are being calibrated in the session.

Can I print or share my 9-Box/Calibration Session?

- Yes! You can print a pdf and export results as an excel file within your calibration session.



Collaborative Calibration

What are some reasons to hold a collaborative calibration session?

- A collaborative calibration session is when multiple leaders wish to convene and discuss the performance and potential of individuals across multiple teams.

How do I create a collaborative calibration session?

- To create a collaborative calibration session, the leader needs to create a new session via the admin center which can be accessed by typing 'manage calibration sessions' in the Talent Connect search bar. Here you can designate people to specific roles and add subjects from multiple teams.

Nominating Successors

Can I nominate someone to my position if they are not on my team?

- Yes. Leaders can nominate people to their position even if they do not report up through them. Please note, that while a leader can nominate someone outside of their vertical structure, they will not be able to see the talent information (performance and potential ratings and talent flags) of the individual.

Can I nominate a successor to another position?

- Yes. Leaders can nominate people to other positions besides their own. However, we suggest that if you wish to nominate one of your direct reports to another position, you should have a conversation with the leader who currently holds that position.

Can I nominate a successor who has not been rated?

- Yes. A nomination does not require performance and potential ratings.

Can I nominate more than one person?

- Yes! Leaders can nominate multiple people to their position. By default, your card in the succession org chart will only display up to 3 successors with full details.

What if I do not have a potential successor to nominate?

- If you do not have someone on your team who is appropriate to nominate as a potential successor, we suggest looking to other parts of the organization for talent by having discussions with your peers, 1-up leader, and HR Strategist. In addition, if applicable, the next time you are hiring to your team, recruit with succession in mind.